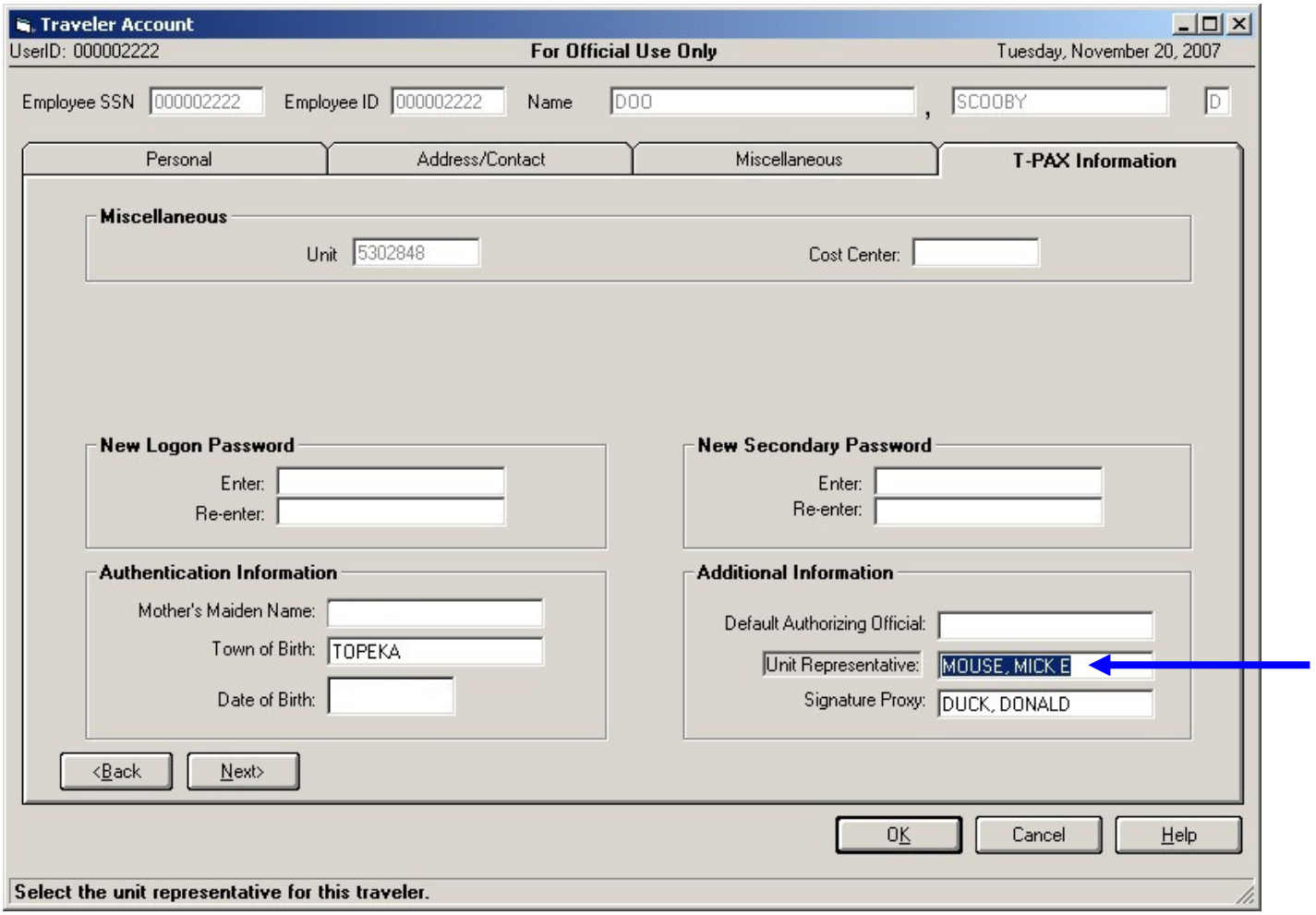
What's New for the field with WinIats/Tpax Version 6.09

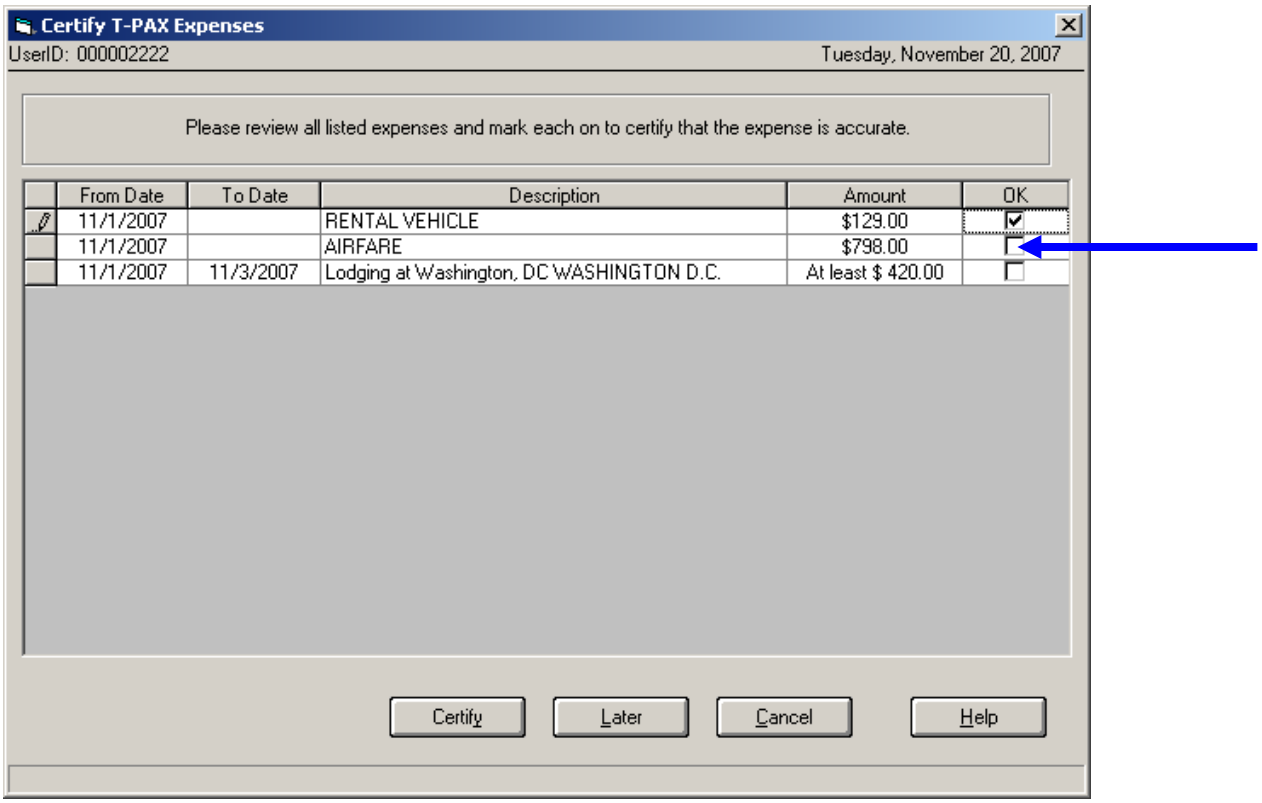
1. Tpax now has a system generated password that goes to member's primary email account that is listed in Tpax when member clicks on **Forgotten Password** button.

Note the use of your "***primary email address***". You must have an email address listed in your Tpax user profile and the Primary checkbox must be marked in order for the password reset feature to work.

2. Unit Representative View – member can now select someone within their own OPFAC to be their designated Unit Representative. This will allow the selected individual to view the traveler/AO box/claims and certain profile information to assist with any problems the traveler/AO may be having. This is done in the member's profile.

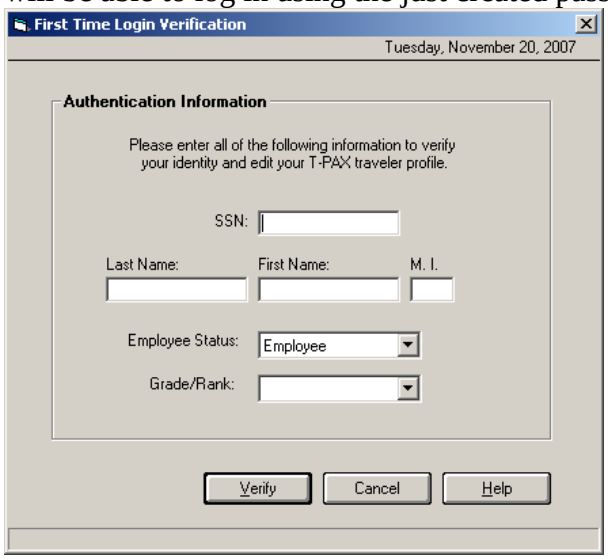


3. Validate Expense Report – a new screen will pop up once the claim is input by the traveler where the system will show a listing of miscellaneous expenses claimed by member and the amount. Member must review to validate each expense (this is being done to help members catch any potential errors…i.e. $1500 in taxi fares vs. $15.00).



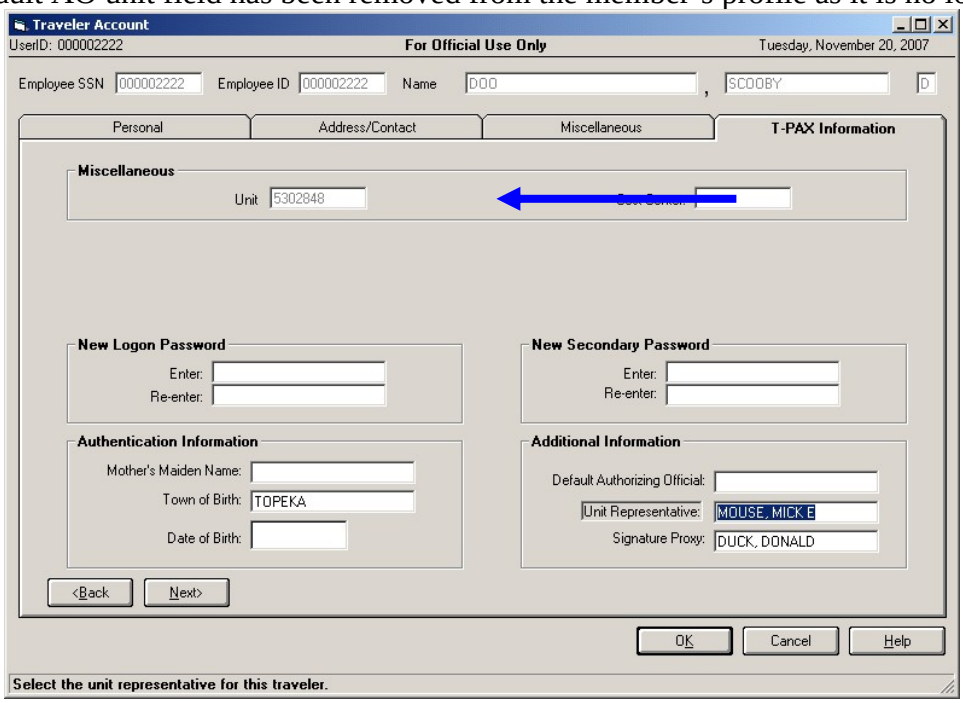
4. Date field entered to show the date the password was last changed to ensure Tpax passwords are required to be changed every 90 days.

5. Increased First time login Verification – when a member is initially loaded into the TPAX, they will need to complete an authentication information screen. If the information is not correct, the system will not allow you into Tpax, if it is correct member will be taken to Tpax profile to be completed. Members will be able to log in using the just created password.

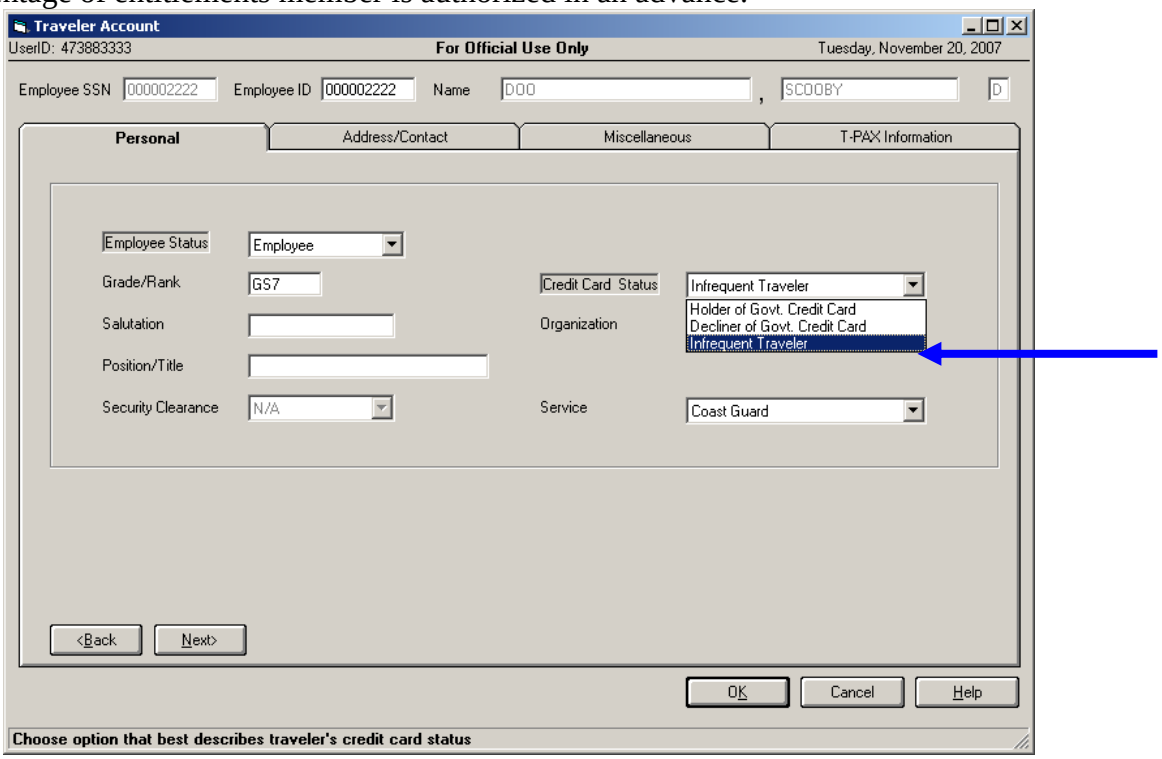


6. AO authorization may have expiration dates that will allow the system to automatically revoke on that date.

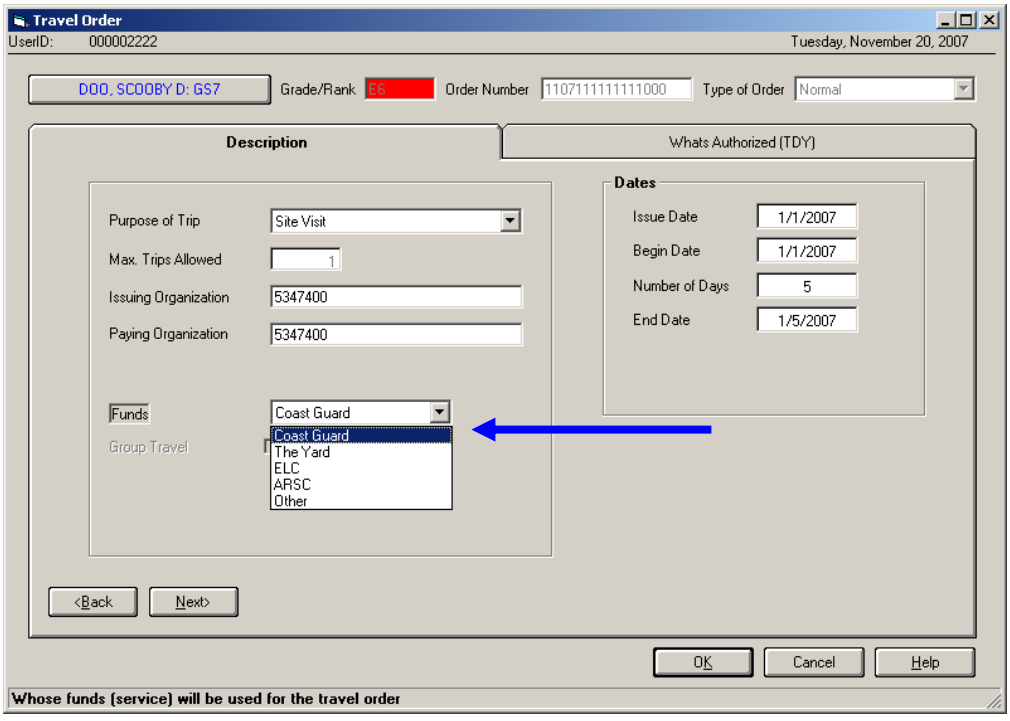
7. The default AO unit field has been removed from the member's profile as it is no longer required.



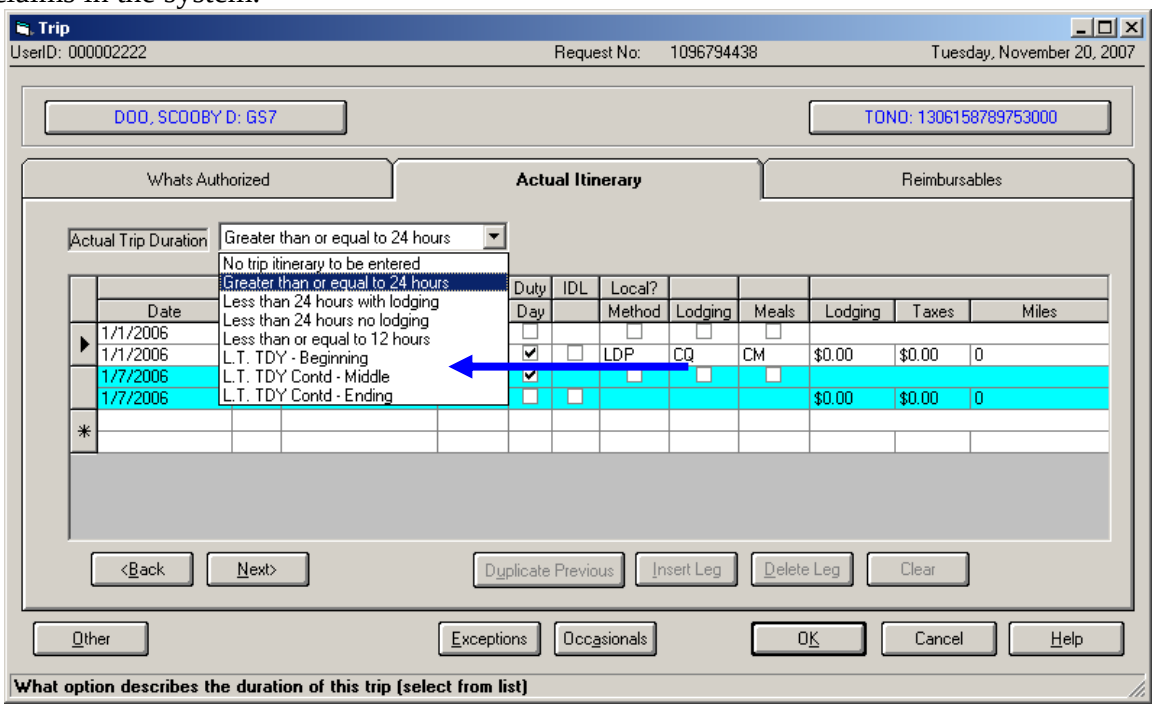
8. Members may now update their profile to indicate Credit Card Status (Holder of Govt. Credit Card, Decliner of Govt. Credit Card, Infrequent Traveler). This status will determine the percentage of entitlements member is authorized in an advance.



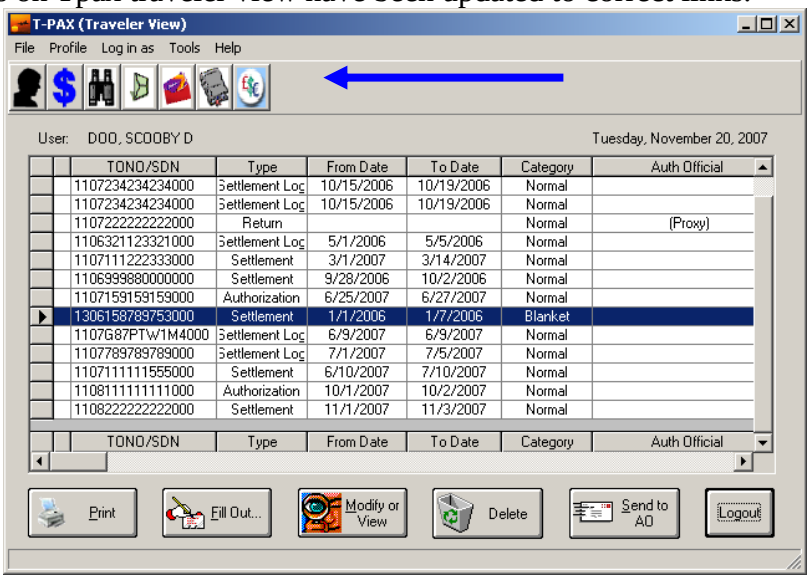
9. Fund type (Coast Guard/ELC/YARD/ARSC) determines Debt letter selected – to allow the member to receive the correct debt letter, the debt letter will be produced IAW the fund type selected.



10. Long term TDY will use “Long Term Cont TDY” option within the itinerary portion of the travel claim to complete settlements. Partial Settlement type – has been removed from TDY type travel claims in the system.

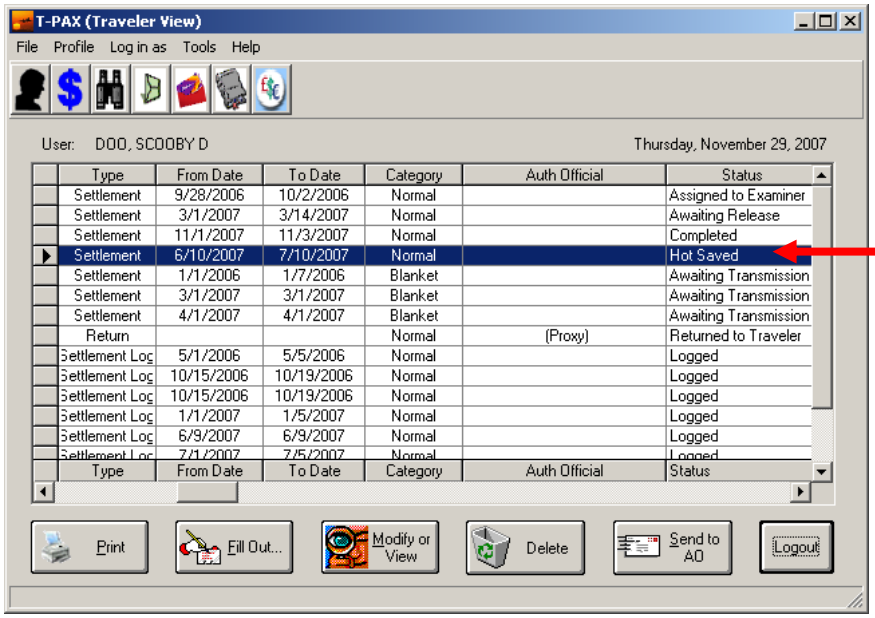


11. Hyperlink boxes on Tpax traveler view have been updated to correct links.

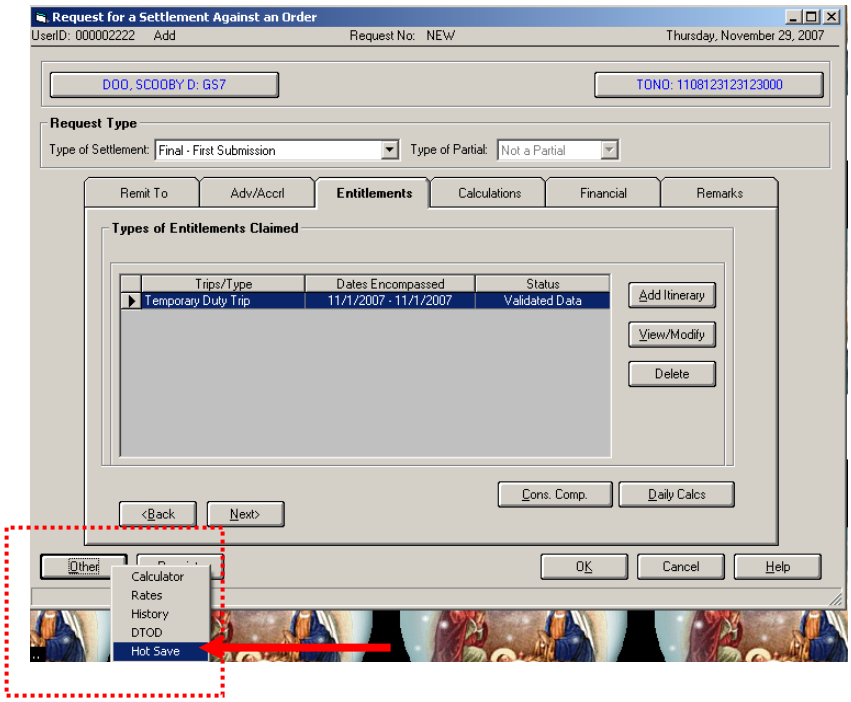


“HOT SAVED” Status

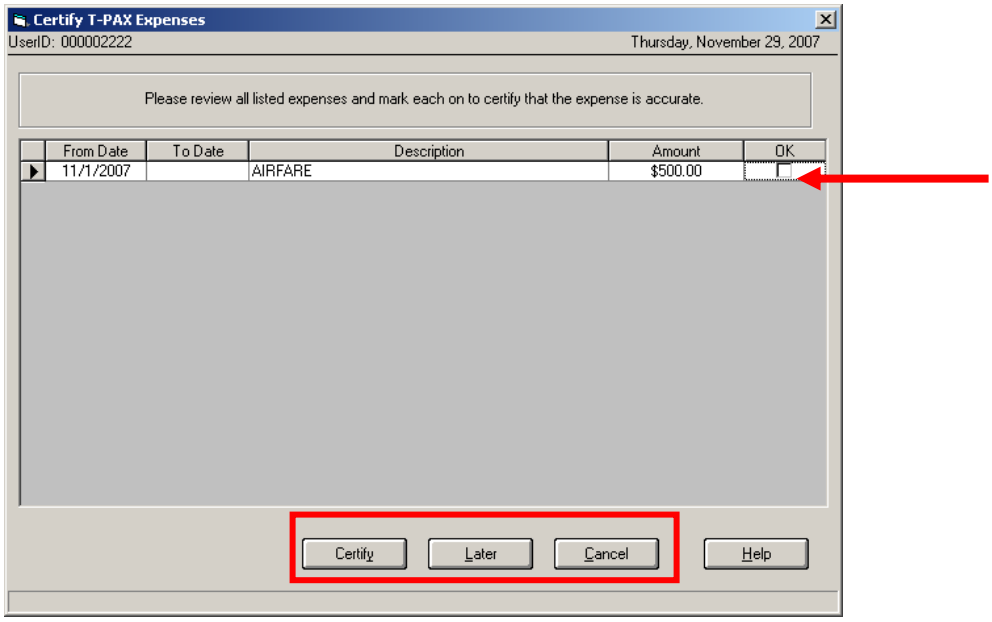
1. There is a new feature in Tpax which allows a member to temporarily save a claim that has not been completed. This will put the claim in the status of “Hot Saved.”



2. This function happens two (2) ways:
   a. Input a partially completed claim, and then on the screen below click the “Other” (at the bottom of the screen, left side) button to click on the “Hot Save” button. This will save your claim in a “Hot Saved” status allowing you to complete it at a later time.

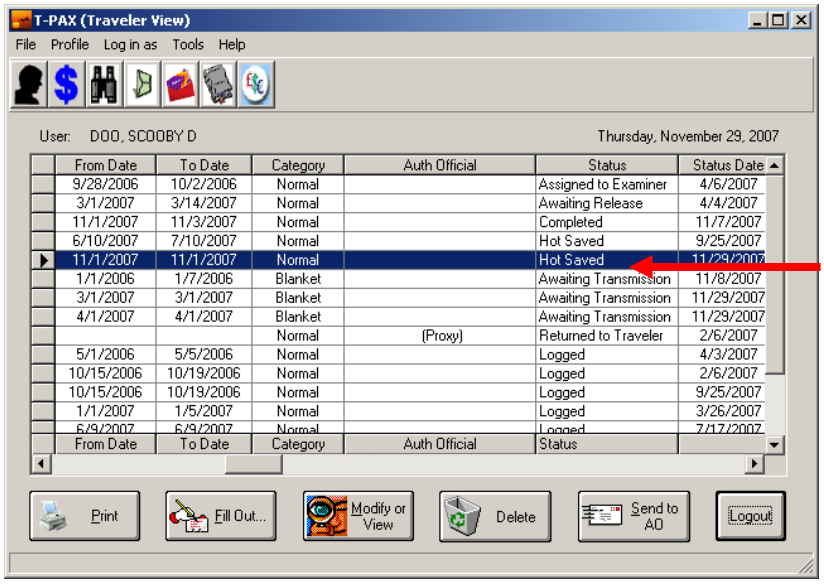


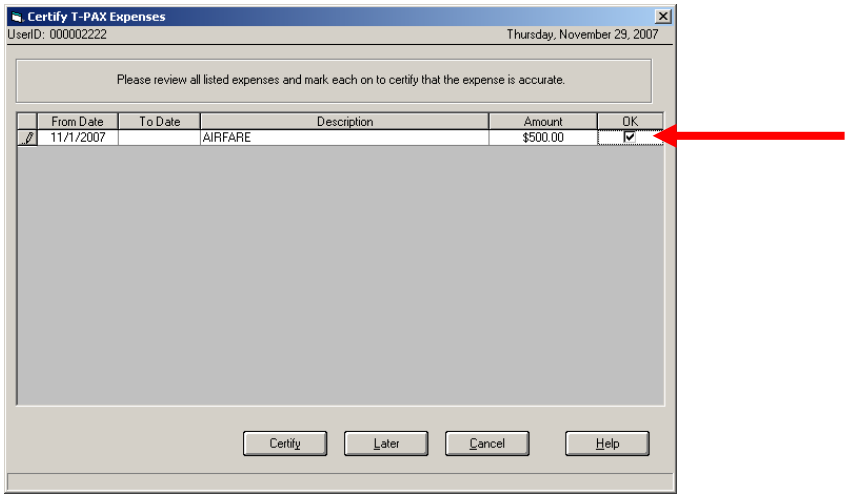
b. After completing your claim and clicking on the OK button, a "Certify Tpax Expense" screen will show up. You are supposed to verify each expenditure by clicking the "OK" box next to each expense amount. Once you have done that you may click "Certify." If you don't have your receipts to verify the amount, you may click the "Later" button which will put the status in a "Hot Saved" status to allow you to come back later to certify the expenses.

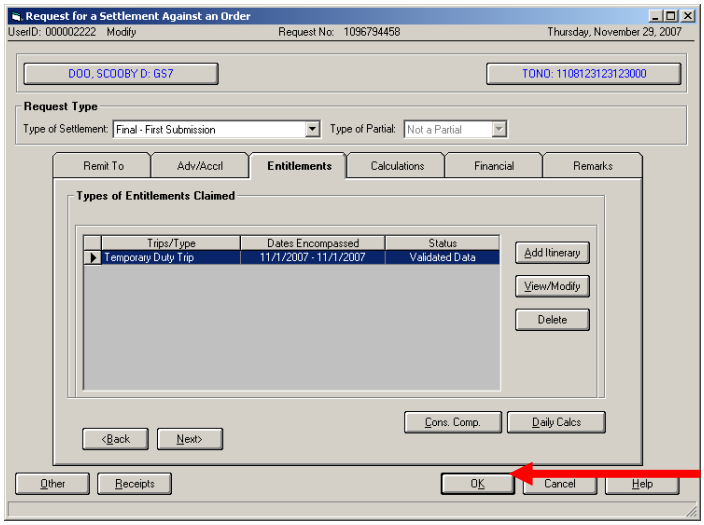


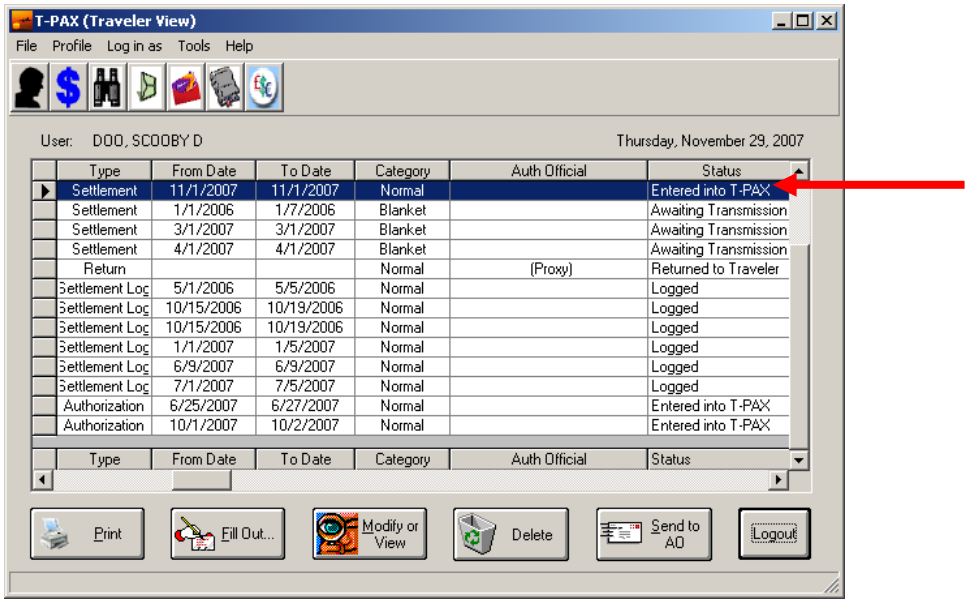
c. If you click on Cancel in the above screen, the system will take you back to the claim to make any necessary corrections.

3. Once a claim is placed into a "Hot Saved" status, a traveler needs to highlight the claim and double click it to reopen the claim and finish processing the document.





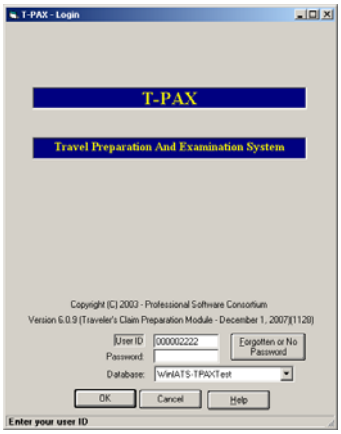




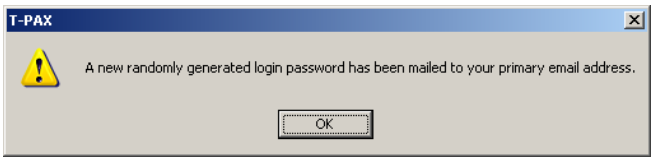
4. Once this is done and the claim is completed, when the traveler clicks OK the claim status will change to “Entered into T-Pax” and then can be forwarded to the AO.

TPAX (Ver. 6.09) Forgotten Password Button Enhancement

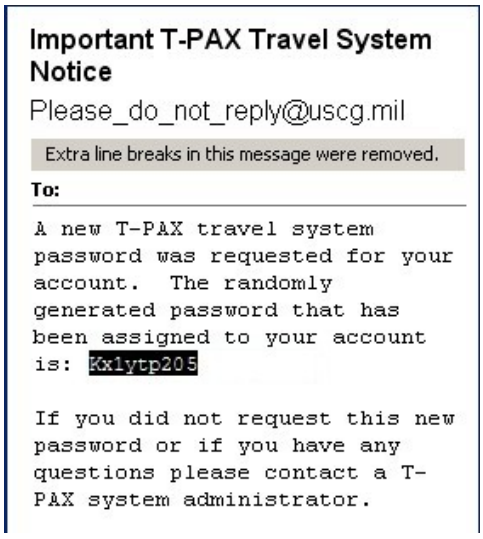
1. If you forget your password, there is a “Forgotten or No Password” button on the main logon screen to TPAX.
    a. Enter your UserID and click the “Forgotten or No Password” button



2. You will see the below popup box indicating an email has been sent to your primary email address listed in your TPAX profile.
    a. Click “OK”

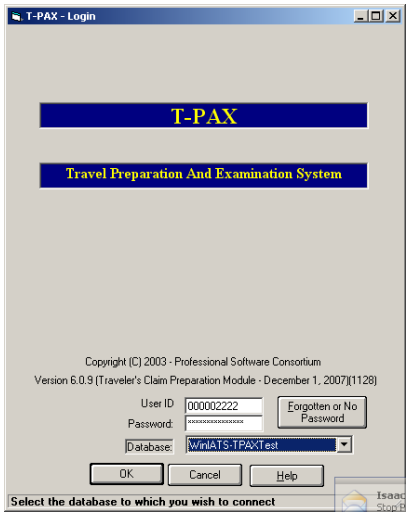


3. Open your primary email account to retrieve the system generated password.

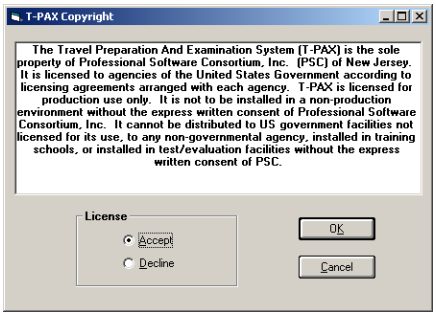


    a. Highlight the password given, right click and copy the password.

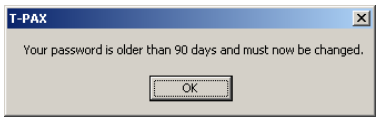
4. Return to the TPAX logon screen, right click and paste the password into the password field then click the “OK” button.



5. Click the radio button next to Accept and click “OK” on the screen below.

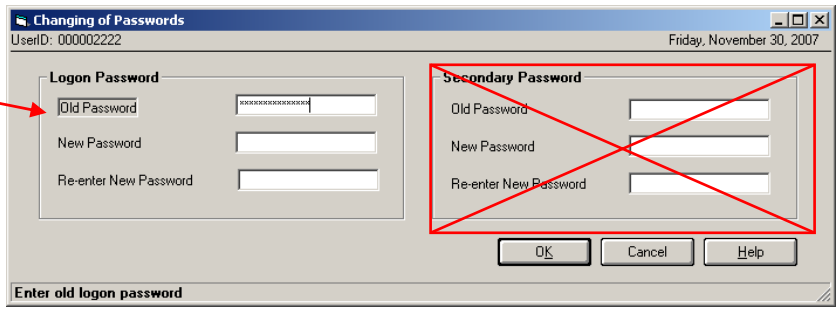


6. A screen will pop up indicating your password is older than 90 days and must now be changed. **This is referring ONLY to your logon password. Click the OK button.



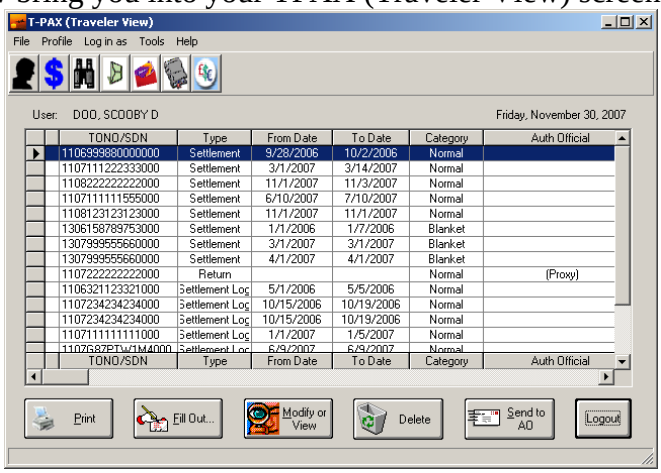
7. This will bring up the below screen where you will right click in the “Old Password” field and paste the password the system generated for you.

“Old” means the password you just received, via email, (see step 3). It should still be on your ‘clipboard’, just right mouse click and select “Paste” to fill it in.

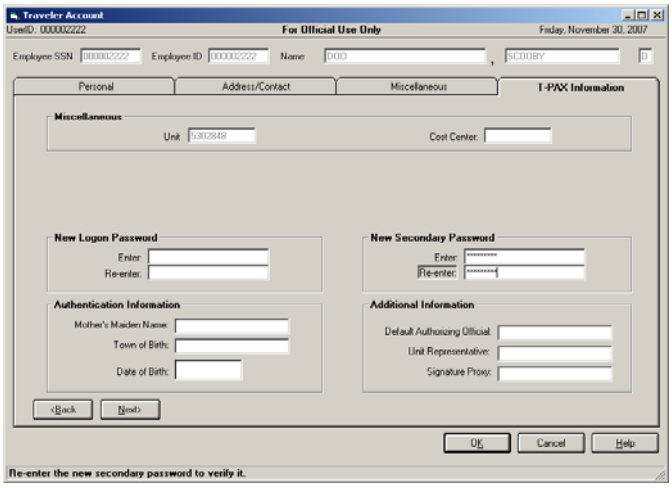


a. Then enter in your New Password and Re-enter the New Password in the appropriate fields and click OK.
    i. Note: You do not have to fill out the SECONDARY PASSWORD information for this process (See step 9).
    ii. New passwords must be **exactly 9** characters in length, consisting of at least 1 number 1 lowercase letter and one upper case letter. **Passwords are case sensitive.**

8. The system will now bring you into your TPAX (Traveler View) screen.



9. If you have forgotten your Secondary/Confirmation Password, click on the profile icon - , which will take you into your TPAX profile screen.
    a. Click on the TPAX Information Tab.
    b. Enter in your New Secondary Password and Re-enter it for conformation.
    c. Click OK to save your password information and return to the TPAX (Traveler View) screen.



Reminder: New passwords must be **exactly 9** characters in length, consisting of at least 1 number 1 lowercase letter and one upper case letter. **Passwords are case sensitive.**

Update 26 November 2007 (Version 6.09):

Increased First time login Verification – when a member is initially loaded into the TPAX, they will need to complete an authentication information screen. If the information is not correct, the system will not allow you into Tpax, if it is correct member will be taken to Tpax profile to be completed. Members will be able to log in using the just created password.

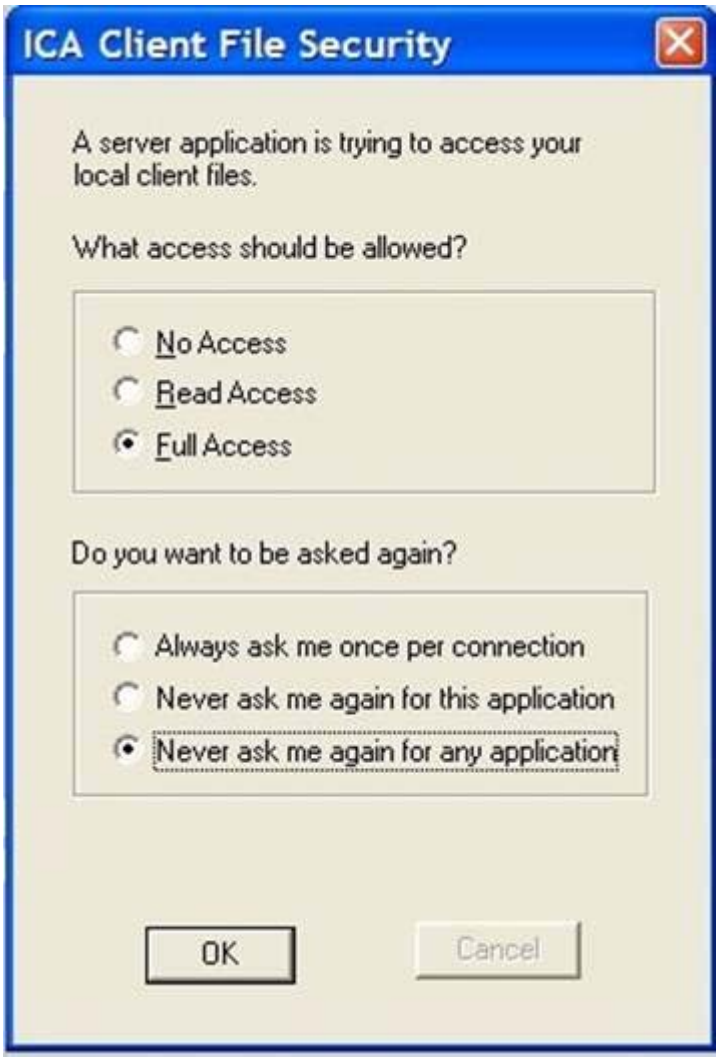
TPAX Initial Logon

Printer friendly version of these instructions.

Start Internet Explorer and navigate to this link: http://cgweb.fincen.uscg.mil/metaframe.htm and click the link "Launch TPAX Application" link in the right-hand column of the page.

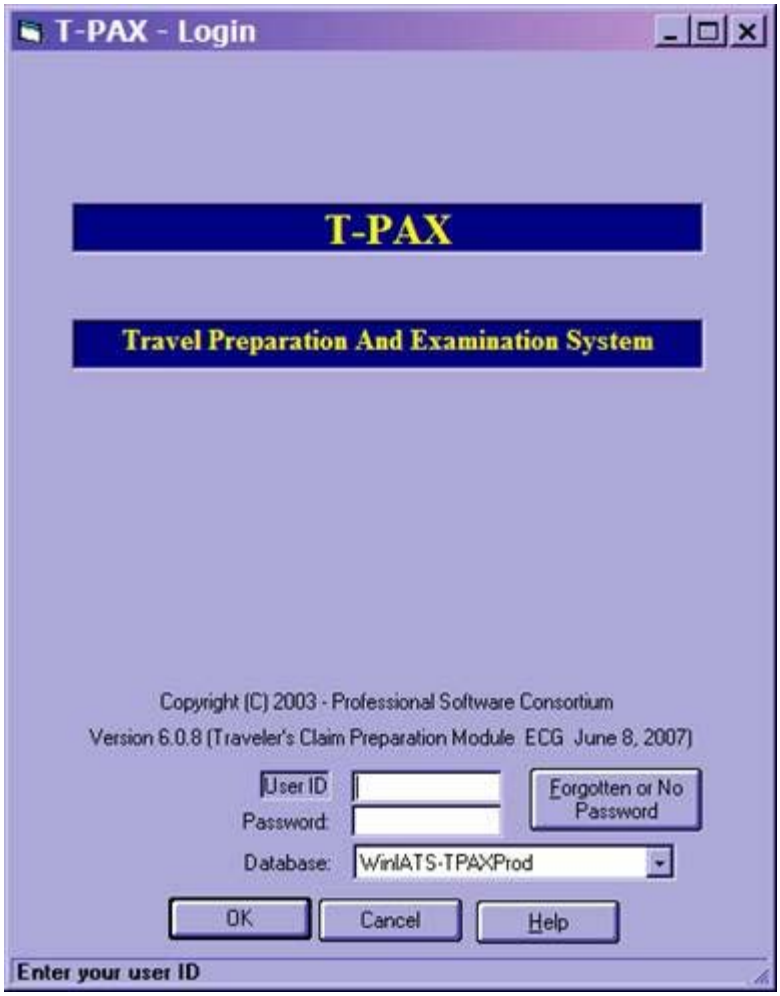
If this is the first time you have accessed the *Citrix Metaframe,* you may get this notice.

A screen may come up asking you what permissions you want
a. Click "Full" permissions
b. Click "Never ask again for any application"



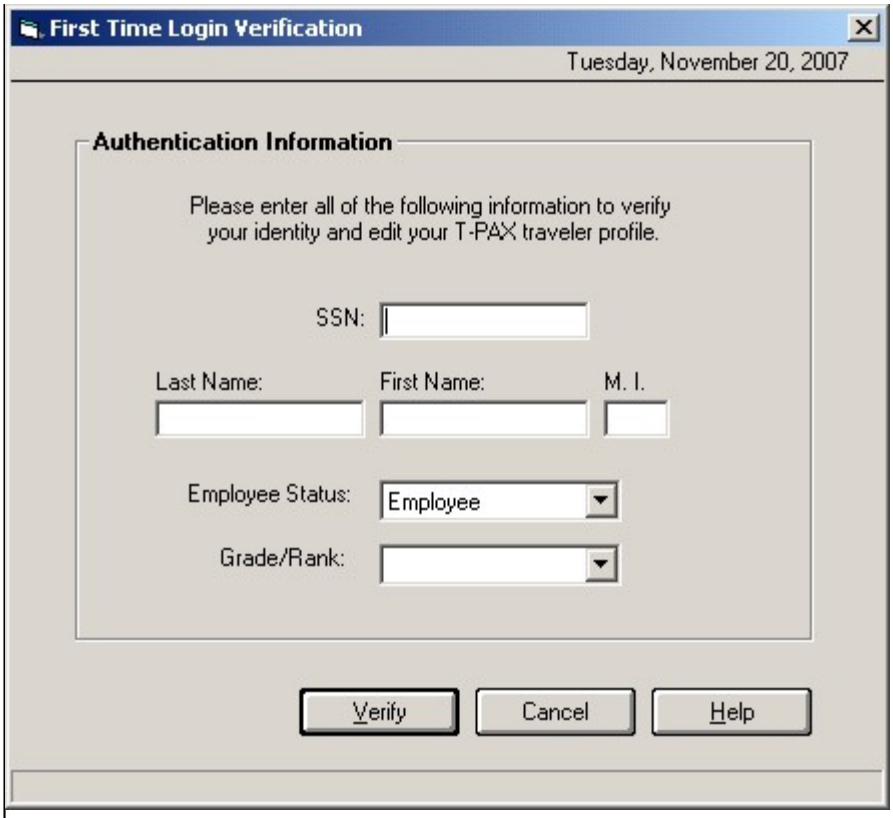
Note: You may also access the Login page for TPAX from the this online help file (http://www.uscg.mil/hq/psc/t-pax/webhelp/) click on the Use T-PAX topic in the table of contents.

You will get the below screen



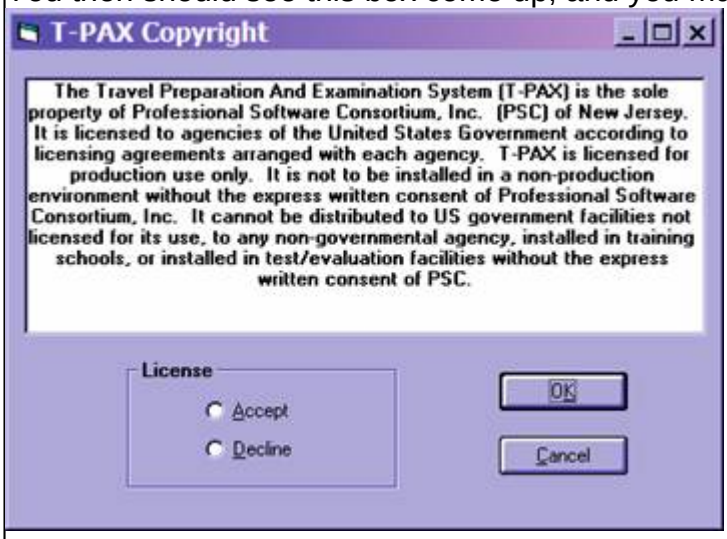
Follow these steps to establish your TPAX user profile:

Step	Action
1	Enter your Employee ID number into the **User ID** field.
2	Click the "Forgotten or No Password"button. 1. Complete the Authentication Information.

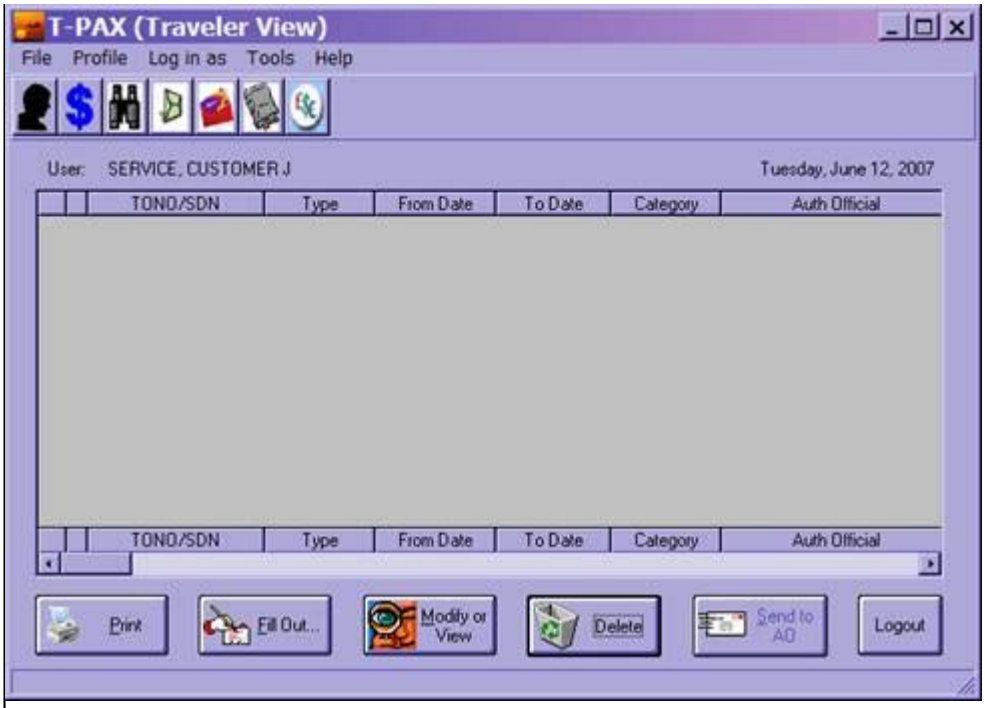


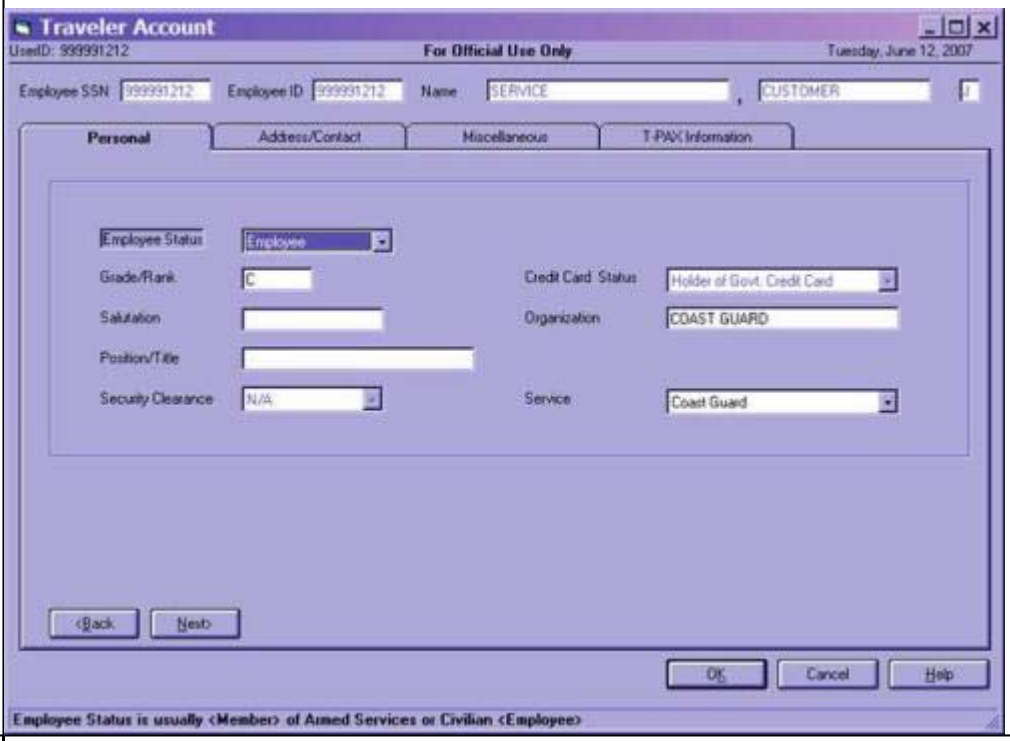
2. Click the **Verify** button

3 You then should see this box come up, and you must select **Accept**, and click **Ok**.



4 You should be brought to a screen that has your Traveler view showing.



5	Click on the black silhouette profile icon: Or the “Profile” drop down list, and select “Modify Or View”.
6	Complete the Personal profile: • Enter your Salutation (Mr. Mrs, LT. ect.) • Ensure your organization is completed, • Verify your service. 
7	Click the **Address/Contact** tab OR click the next button at the bottom left corner to go to the

next page.

Address/Contact

Address/Contact page:

- Please ensure that you enter your home, and work mailing address.
- Enter your work e-mail address in the proper spot, and **check the primary address box**. This will ensure that you receive the notification from your AO when your claim has been approved. You will receive an e-mail from the system when your claim is completed by PSC. This is also the e-mail address that will be used, by the system, for forgotten password resets.
- You can choose to enter two e-mail addresses and check both for delivery, and you will get the notification at both locations.

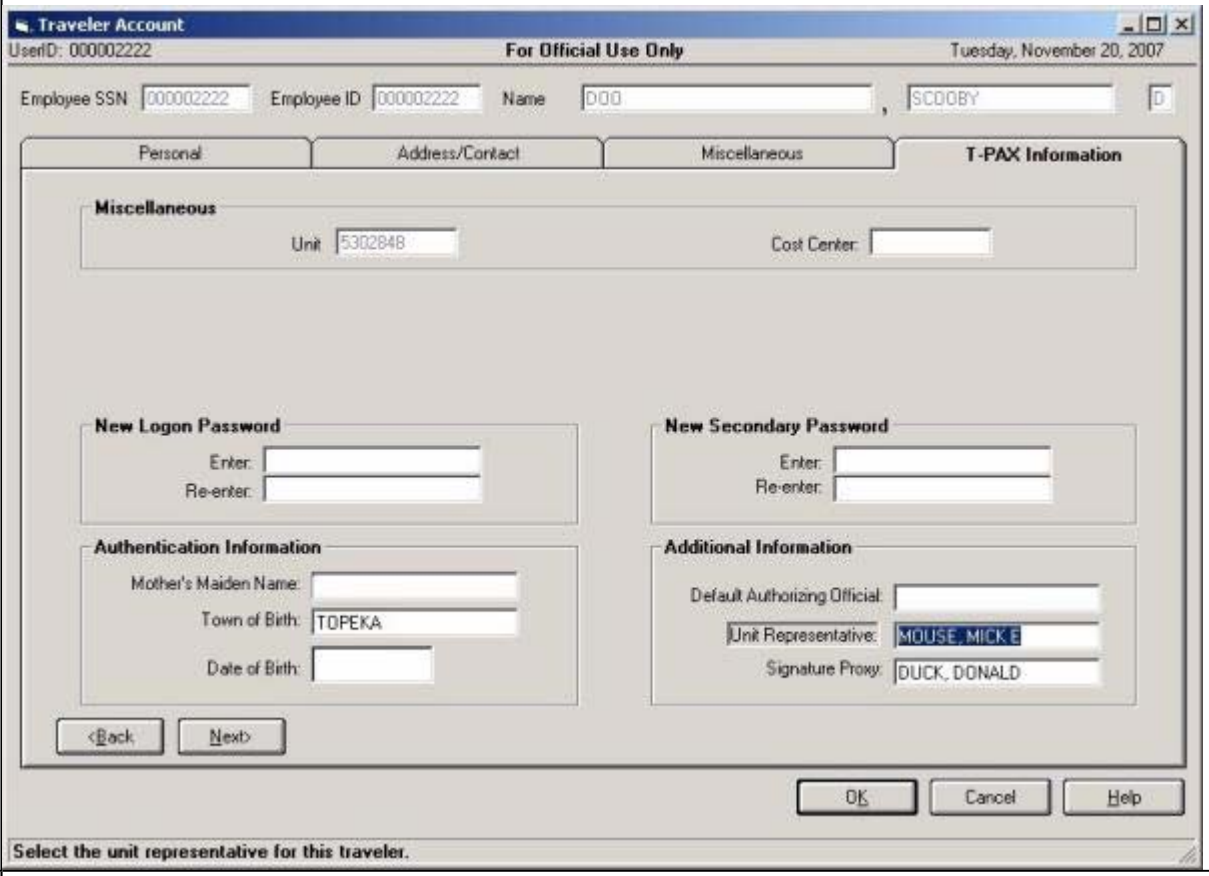
8 Click the **TPAX Information** tab OR CLICK the next button at the bottom left corner to go to the next page.

T-PAX Information

TPAX Information page:

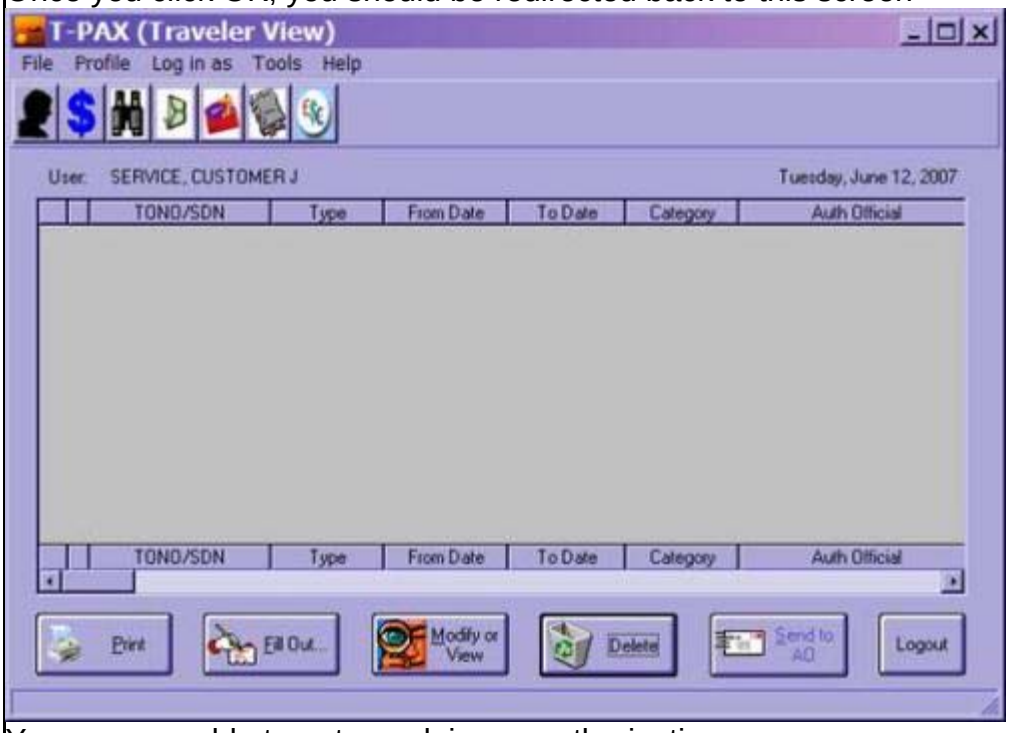
- Enter a new logon password; it must be **nine characters**, with one capital letter, one lower case letter and one number (example: Zrp4x83yq). You may not use special characters.
- Repeat this same password in the re-enter block.
- Enter a secondary password, and re-enter it again.
- You may choose to have the same password for both your logon password, and your secondary password.
- Under Authentication Information, you will need to enter your mother's maiden name,
- **Your town of birth** (you may use spaces in the city), and
- **Your date of birth** (in MM/DD/YYYY format).
- If you know who will be approving most of your claims, you may select a default **Authorizing Official** at this time
- You may designate a **Unit Representative.** This will allow the selected individual to view the traveler/AO box/claims and certain profile information to assist with any

problems the traveler/AO may be having.



9 Click the **OK** button in the bottom right corner to save all of your profile information.

10 Once you click OK, you should be redirected back to this screen



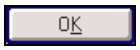
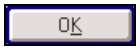
You are now able to enter a claim, or authorization.

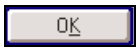
	Please remember to keep the information in this profile up to date, and ensure that anytime your e-mail address changes, you must update it to continue to get your notifications from the system.
11	Congratulations on completing the TPAX Initial Log On. Refer to http://www.uscg.mil/hq/psc/travel/t-pax/webhelp/ for instructions on creating authorizations and claims.
12	Click the ***Logout*** button to exit the system. **End of Procedure.**

Printer friendly version of these instructions.

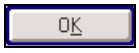
Questions, problems, need more information or have a comment?
Submit an Online Trouble-Ticket/Info Request or call
(866) 772-8724 (toll free) or (785) 339-2200 -- 0700-1600 M-F (central time) and select weekends as posted on http://www.uscg.mil/hq/psc/ccb/
(Note: Password resets are not provided via telephone. Use the Online Trouble-Ticket for password problems)

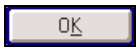
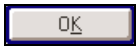
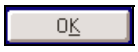
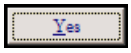
Completing a New Set of Orders

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Press **[Tab]**.
3.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
4.	Click the **OK** button. 
5.	Click the **Accept** object.
6.	Click the **OK** button. 
7.	Click the **Fill Out** button.
8.	Click the **Request for Travel Authorization** menu.
9.	Enter the desired information into the **Order Number** field. Enter a valid value, e.g. "**1105235PBR123000**".
10.	Press **[Tab]**.
11.	**Type of Order** is next; however, these orders are Normal. You can **tab** through the six fields on the left side of the screen, or click the field you want. These orders were **Issued** the same date as they were entered. Click in the **Begin Date** field.
12.	Enter the desired information into the **Begin Date** field. Enter a valid value, e.g. "**6/22/05**".
13.	Press **[Tab]**.
14.	Enter the desired information into the **Number of Days** field. Example "**3**".
15.	Press **[Tab]**.
16.	Click the **Whats Authorized (TDY)** tab.
17.	Click the **POV Authorized** option.

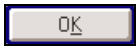
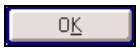
18.	Click the **POV More Advantageous** option.
19.	Click the **OK** button. 
20.	Click the **Expected Itinerary** tab.
21.	Press **[Tab]**.
22.	Press **[Tab]**.
23.	Enter the desired information into the **State/Country** field. Enter a valid value, e.g. "**KS**".
24.	Press **[Tab]**.
25.	Enter the desired information into the **City** field. Enter a valid value, e.g. "**TOPEKA**".
26.	Press **[Tab]**.
27.	Click the **OK** button.
28.	Press **[Tab]**.
29.	Press **[Tab]**.
30.	Press **[Tab]**.
31.	Enter the desired information into the **State/Country** field. Example "**MO**".
32.	Press **[Tab]**.
33.	Enter the desired information into the **City** field. Enter a valid value, e.g. "**KANSAS CITY**".
34.	Press **[Tab]**.
35.	Click the **OK** button.
36.	Press **[Tab]**.
37.	Press **[Tab]**.
38.	Press **[Tab]**.
39.	Press **[Tab]**.
40.	Press **[Tab]**.

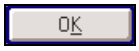
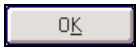
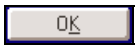
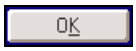
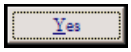
41.	**Note:** Occassionally, UTS(T-Pax) will pre-fill this field with the maximum *daily* per diem rate based on the per diem tables. If your lodging rate is lower, you are able to change the amount. Press **[Tab]**.
42.	This is the daily rate for room taxes based on location and room rate. Enter the desired information into the **Taxes** field. Enter a valid value, e.g. "**12.50**".
43.	Press **[Tab]**.
44.	UTS(T-Pax) accesses the DTOD website and calculates numerous factors, including major construction, rush hour, direction of travel, etc., and determines the best route. 72 miles is a detour route based on these factors. UTS(T-Pax then pre-fills this field. Press **[Tab]**.
45.	Enter the desired information into the **Date** field. Enter a valid value, e.g. "**6/24/05**".
46.	Press **[Tab]**.
47.	Press **[Tab]**.
48.	Press **[Tab]**.
49.	Press **[Tab]**.
50.	Press **[Tab]**.
51.	Enter the desired information into the **Date** field. Enter a valid value, e.g. "**6/24/05**".
52.	Enter the desired information into the **State/Country** field. Example "**KS KANSAS**".
53.	Enter the desired information into the **City** field. Enter a valid value, e.g. "**TOPEKA**".
54.	Press **[Tab]**.
55.	Press **[Tab]**.
56.	Click the **OK** button.
57.	Enter the desired information into the **Reason** field. Enter a valid value, e.g. "**MC**".
58.	Press **[Tab]**.
59.	Note the mileage difference. The DTOD website calculates numerous factors, including major construction, rush hour, etc., and determines the best route. 72 miles is a detour route based on these factors, including the direction of travel. 64 miles is the most 'direct' route, and for the return trip is best. Click the **Reimbursables** tab.

60.	Enter the desired information into the **Nature of Expense** field. Enter a valid value, e.g. "**tolls**".
61.	Press **[Tab]**.
62.	Enter the desired information into the **Amount** field. Enter a valid value, e.g. "**4.50**".
63.	Press **[Tab]**.
64.	Click the **OK** button. 
65.	Click the **Calculations** tab.
66.	Click the **Financial** tab.
67.	Click the **Modify Accounting** button.
68.	Click the **TONO** field.
69.	Press **[Tab]**.
70.	Enter the desired information into the **R/D** field. Example "**P**".
71.	Press **[Tab]**.
72.	Enter the desired information into the **Appr** field. Enter a valid value, e.g. "**01**".
73.	Press **[Tab]**.
74.	Enter the desired information into the **Limit** field. Enter a valid value, e.g. "**199**".
75.	Press **[Tab]**.
76.	Enter the desired information into the **Allt** field. Enter a valid value, e.g. "**56**".
77.	Press **[Tab]**.
78.	Enter the desired information into the **ProgEle** field. Enter a valid value, e.g. "**BF**".
79.	Press **[Tab]**.

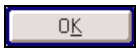
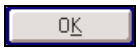
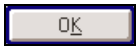
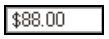
80.	Enter the desired information into the **CstAct** field. Enter a valid value, e.g. "**70870**".
81.	Press **[Tab]**.
82.	Enter the desired information into the field. Enter a valid value, e.g. "**2100**".
83.	Press **[Tab]**.
84.	Click the **OK** button. 
85.	Click the **Remarks** tab.
86.	Any remarks added in this field will appear on the orders. Press **[Tab]**.
87.	Click the **OK** button.
88.	Click the **Send to AO** button.
89.	Since Mr. Duck has been designated as the 'default' AO, he automatically fills this field. Click the **OK** button. 
90.	Enter the desired information into the field. Enter a valid value, e.g. "**1234ABCD**".
91.	Click the **OK** button. 
92.	Click the **Logout** button.
93.	Click the **Yes** button. 
94.	Congratulations for completing the Enter New Orders tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

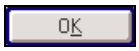
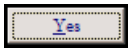
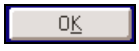
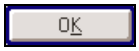
Requesting a Travel Advance

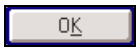
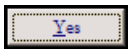
1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Press **[Tab]**.
3.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**ABCD1234**".
4.	Click the **OK** button.
5.	Click the **Accept** option.
6.	Click the **OK** button. 
7.	Click the **Fill Out** button.
8.	Click the **Request for Advance** menu.
9.	Select the desired set of orders from the **Order Number** list.
10.	Click the **OK** button. 
11.	Click the **Calculations** tab.
12.	Click in the **Advance Authorized** field.
13.	The note the bottom of the screen provides the **maximum advance authorized.** Enter the desired information into the **Advance Authorized** field. Enter a valid value, e.g. "**173.00**".
14.	Click the **Financial** tab.
15.	The **Method of Payment** does not need to be changed as the system will default to EFT. Click the **Modify Accounting** button.
16.	Click the **Horizontal scrollbar** scrollbar.

17.	Verify the dollar amount. Click the **OK** button. 
18.	Click the **OK** button. 
19.	Click an entry in the list. Click on the **Advance** request.
20.	Click the **Send to AO** button.
21.	Click the **OK** button. 
22.	Enter the desired information into the **Enter Password** field. Enter a valid value, e.g. "**1234ABCD**".
23.	Click the **OK** button. 
24.	Click the **Logout** button.
25.	Click the **Yes** button. 
26.	Congratulations for completing the Request for Advance tutorial. Click the icons below to view in depth plicies and procedures. **End of Procedure.**

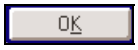
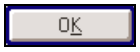
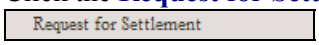
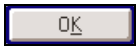
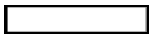
Completing a New Travel Claim

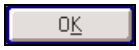
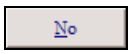
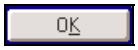
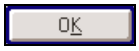
1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
3.	Click the **OK** button. 
4.	Click the **Accept** option.
5.	Click the **OK** button. 
6.	Click the **Fill Out** button.
7.	Click the **Request for Settlement** menu.
8.	Click the desired **TONO.**
9.	Click the **OK** button. 
10.	Click the **Adv/Accrl** tab.
11.	Click the **Entitlements** tab.
12.	Click the **View/Modify** button.
13.	Click the **Actual Itinerary** tab.
14.	Click in the **Lodging** field. 
15.	Enter the desired information into the **Lodging** field. Enter a valid value, e.g. "**76.00**".
16.	Press **[Tab]**.
17.	Enter the desired information into the **Taxes** field. Enter a valid value, e.g. "**11.43**".
18.	Press **[Tab]**.

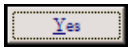
19.	Click the **Reimbursables** tab.
20.	Press **[Tab]**.
21.	Press **[Tab]**.
22.	Press **[Tab]**.
23.	Enter the desired information into the **Amount Claimed** field. Enter a valid value, e.g. "**3.50**".
24.	Press **[Tab]**.
25.	Press **[Tab]**.
26.	Click the **OK** button. 
27.	Click the **Yes** button. 
28.	Click in the **Lodg.Taxes** field.
29.	Enter the desired information into the **Lodg. Taxes** field. Example "**11.43**".
30.	To change the next Lodging Tax amount, click in the next **Lodg.Taxes** field.
31.	Enter the desired information into the **Lodg.Taxes** field. Enter a valid value, e.g. "**11.43**".
32.	Click the **OK** button. 
33.	Click the **OK** button. 
34.	Click the **Calculations** tab.
35.	Click the **Financial** tab.
36.	Click the **Modify Accounting** button.
37.	Click the **Horizontal scrollbar** scrollbar.
38.	Verify the **Amount** has changed. Click the **OK** button.

39.	Click the **Remarks** tab.
40.	All information typed in the **Remarks** block will appear on both the printed orders and the travel claim. Click the **OK** button. 
41.	Click the **Send to AO** button.
42.	Since Mr. Duck has already been set as the Default AO, his name automatically appears. Click the **OK** button.
43.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".
44.	Click the **OK** button.
45.	Click the **Logout** button.
46.	Click the **Yes** button. 
47.	Congratulations for completing the Completing a New Travel Claim tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

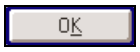
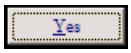
Completing a Supplemental Travel Claim

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
3.	Click the **OK** button. 
4.	Click the **Accept** option.
5.	Click the **OK** button. 
6.	Click the **Fill Out** button.
7.	Click the **Request for Settlement** menu. 
8.	Click on the **Order Number** desired. Select Order Number **1105235PBR123000**.
9.	Click the **OK** button. 
10.	Click the **Entitlements** tab.
11.	Click the **View/Modify** button.
12.	Click the **Reimbursables** tab.
13.	Click in the *second* **Date** field. 
14.	Press **[Tab]**.
15.	Enter the desired information into the **Nature of Expense** field. Enter a valid value, e.g. "**PARKING**".
16.	Press **[Tab]**.
17.	Press **[Tab]**.
18.	Enter the desired information into the **Amount Claimed** field. Enter a valid value, e.g. "**20.00**".

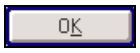
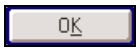
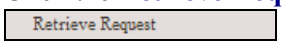
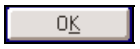
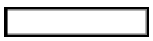
19.	Press **[Tab]**.
20.	Press **[Tab]**.
21.	Click the **OK** button. 
22.	Since Meals and Lodging were not effected, they do not have to be recalculated. Click the **No** button. 
23.	Click the **Calculations** tab.
24.	Verify the amount **Due Member.** Click the **Financial** tab.
25.	Click the **Modify Accounting** button.
26.	Click the **Horizontal scrollbar** scrollbar.
27.	Verify the **Amount** due. Click the **OK** button.
28.	Click the **Remarks** tab.
29.	Click in the **Remarks** field.
30.	Enter the desired information into the **Remarks** field. Enter a valid value, e.g. "**Please pay additional expense for parking.**".
31.	Click the **OK** button. 
32.	Click the desired Settlement from the list. Select **TONO/SDN 1105235PBR123000**
33.	Click the **Send to AO** button.
34.	Since Mr. Duck is the default AO, his name automatically appears. Click the **OK** button. 
35.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".

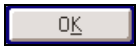
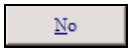
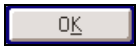
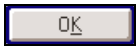
36.	Click the **OK** button.
37.	Click the **Logout** button.
38.	Click the **Yes** button. 
39.	Congratulations for completing the Completing a Supplemental Travel Claim tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

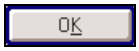
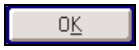
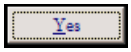
Print TVS

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Press **[Tab]**.
3.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
4.	Click the **OK** button.
5.	Click the **Accept** option.
6.	Click the **ok** button. 
7.	Click the **Horizontal scrollbar** scrollbar.
8.	To print a **Travel Voucher Summary (TVS)**, the claim status must be "**Completed**". Select the claim for **$25.00 (est).**
9.	Click the **Print** button.
10.	Click the **Print Travel Voucher** menu.
11.	Click the **Print** button.
12.	Click the **Logout** button.
13.	Click the **Yes** button. 
14.	Congratulations for completing the Print TVS tutorial. Click the icons below to view in depth policies and procedures. **End of Procedure.**

Retrieve Orders/Claim

1.	Enter the desired information into the **User ID** field. Enter a valid value, e.g. "**1234567**".
2.	Enter the desired information into the **Password** field. Enter a valid value, e.g. "**abcd1234**".
3.	Click the **OK** button. 
4.	Click the **Accept** option.
5.	Click the **OK** button. 
6.	Click the Request for Settlement on TONO **1105235PBR123000** in an **Awaiting AO approval** status. Note: Only the word "**Awaiting**" is visible on this screen.
7.	Click the **File** menu.
8.	Click the **Retrieve Request** menu. 
9.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".
10.	Click the **OK** button. 
11.	Click the Request for Settlement on TONO **1105235PBR123000** in an **Entered** status.
12.	Click the **Modify or View** button.
13.	Click the **Entitlements** tab.
14.	Click the **View/Modify** button.
15.	Click the **Reimbursables** tab.
16.	Click in the first open **Date** field. 
17.	Press **[Tab]**.
18.	Enter the desired information into the **Nature of Expense** field.

	Enter a valid value, e.g. "**Telephone Calls Long Distance**".
19.	Press **[Tab]**.
20.	Press **[Tab]**.
21.	Enter the desired information into the **Amount Claimed** field. Enter a valid value, e.g. "**5.00**".
22.	Press **[Tab]**.
23.	Press **[Tab]**.
24.	Click the **OK** button. 
25.	Since the daily meals and lodging information has not changed, there is no need to recalculate. Click the **No** button. 
26.	Click the **Calculations** tab.
27.	Verify **Amount Due Member** has updated. Click the **Financial** tab.
28.	Click the **Modify Accounting** button.
29.	Click the **Horizontal scrollbar** button of the right side of the scrollbar.
30.	Verify the **Amount** has updated. Click the **OK** button. 
31.	Click the **Remarks** tab.
32.	Enter the desired information into the **Remarks** field. Enter a valid value, e.g. "**and phone calls.**".
33.	Click the **OK** button. 
34.	Click the **Send to AO** button.
35.	Since Mr. Duck is the designated AO, his name automatically appears. Click the **OK** button.

	
36.	Enter the desired information into the **Secondary Password** field. Enter a valid value, e.g. "**1234abcd**".
37.	Click the **OK** button. 
38.	Click the **Logout** button.
39.	Click the **Yes** button. 
40.	Congratulations for completing the Retreive Orders/Claim tutorial. Click on the icons below to view in depth policies and procedures. **End of Procedure.**